Data Mapping

Customer Requisition

March 6, 2000

Data mapping: *Customer Requisition*

To access the Customer subsystem, click the *Worksheet* icon from the CSTAR desktop, this will display a list of subsystems (fig. 1).

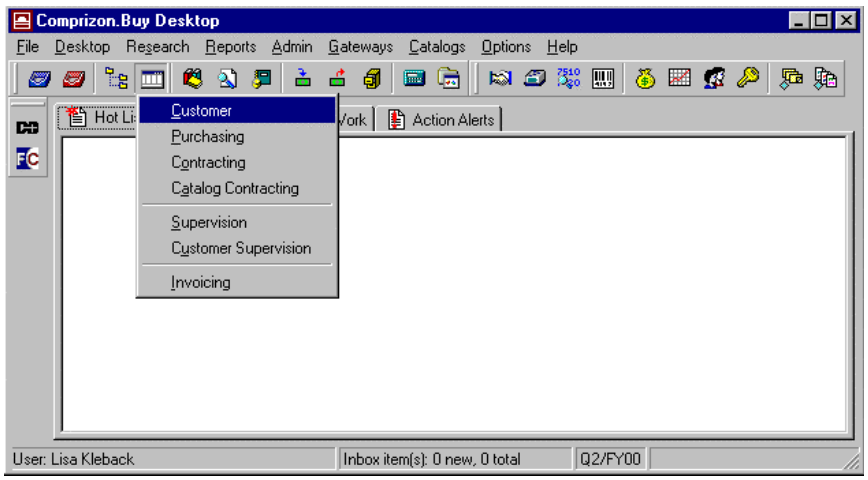

Figure 1 – Worksheet icon – subsystems

Highlight and click the *Customer subsystem* from the list, this will display the *Customer Worksheet* (fig. 2).

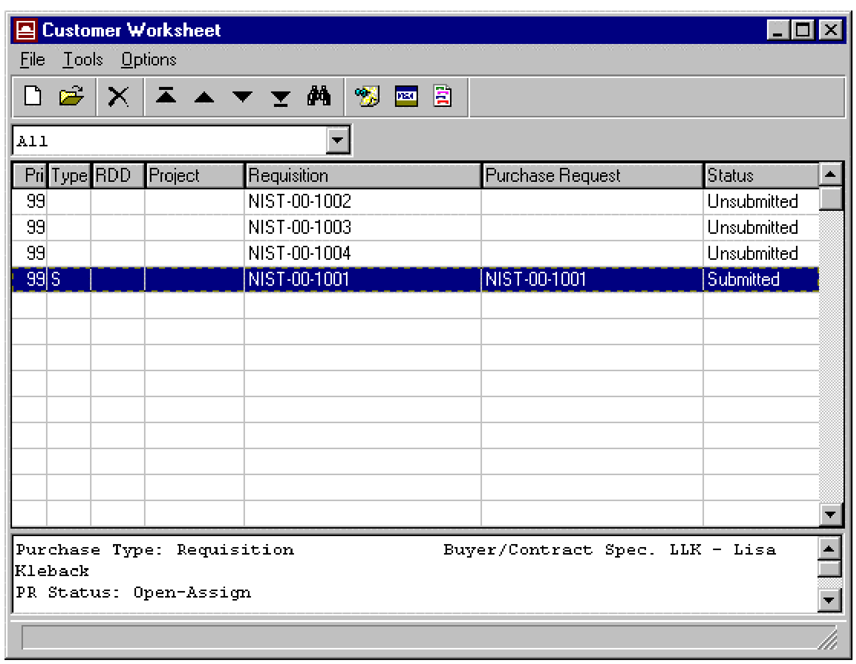

Figure 2 – Customer Worksheet

To create a new requisition, users will click the *New* button located within the *Customer Worksheet* this will display the *New Customer Requisition Screen* (fig. 3).

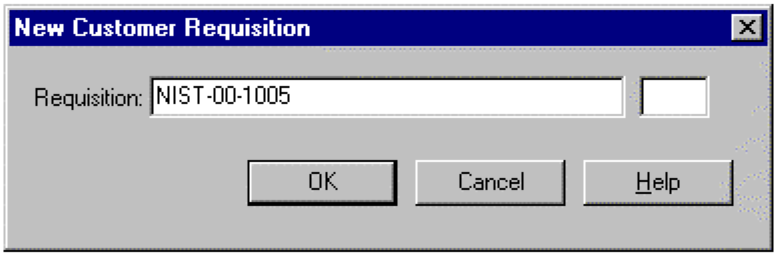

Figure 3 – New Customer Requisition Screen

From the *New Customer Requisition Screen*, users will either enter a requisition PIIN number or accept the default requisition number provided.

Field Name	Field Description
Requisition Number	Requisition PIIN Number **Field Type:** Max 20 alphanumeric

Click the *OK* button 

this will display the *Customer Requisition Administrative* portion that includes four tab screens.

The *Admin* tab will display (fig. 4).

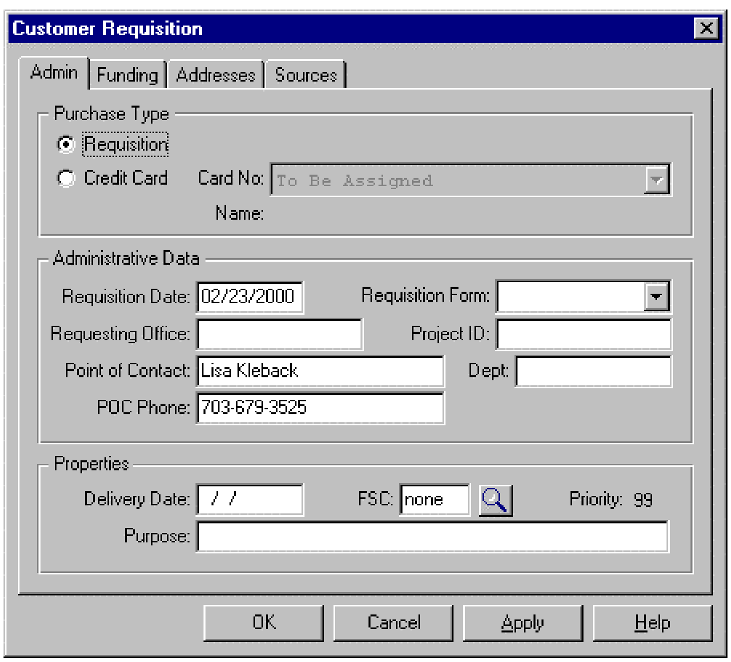

Figure 4 – Customer Requisition Admin Screen

Enter pertinent information in the following corresponding fields.

Be sure to use the <*TAB*> key to move from field to field.

Field Name	Field Description
Purchase Type	• Requisition – purchase type used for ordering supplies/services that will be submitted to Procurement. • Credit Card – used for purchases that are paid by credit card. **Field Type:** 1 character S= Simplified C=Credit Card
Requisition Form	Standard form **Field Type:** Max 9 characters Integer
Requesting Office	If the "Purchase For" name and address on the Addresses TAB, is sufficient identification for this acquisition, then you may leave the Requesting Office blank. **Field Type:** Max 15 alphanumeric characters
Project ID	Enter a project name or other identification code for this procurement. ***Note:*** *The Project field remains available on all line item screens from requisition through award and modifications.* **Field Type:** Max 8 alphanumeric characters
POC Name	Defaults the name of the person that is logged into CSTARS. ***Note****: POC Name should be the person that is most familiar with the requisition. The POC may need to be contacted for questions concerning the requisition purchase.* **Field Type:** Max 30 alphanumeric characters
Department	All sites do not use this field. If this requisition is being initiated by or for a specific department, section, group, or team you may identify them here. **Field Type:** Max 15 alphanumeric characters
POC Telephone	Defaults the telephone number of the person that is logged into CSTARS. **Field Type:** Max 20 alphanumeric characters
Delivery Date	Enter the delivery date for items/services being procured. ***Note:*** *The Delivery Date entered on the administrative screen of the requisition, purchase request, solicitation, or award, is copied to each of the line items as you create them.* **Field Type:** Date field Format: MM/DD/YYYY
FSC	Select from the list of Federal Supply Class Codes. **Field Type:** Max 4 alphanumeric characters
Priority	Sites may enable/disable and specify the priority level of procurement. **Field Type:** Integer 99
Purpose	Enter why the supplies are being ordered, or the services being performed. **Field Type:** Max 120 alphanumeric characters

When finished, users will click the *Funding* tab, this will display the *Customer Requisition Funding Screen* (fig. 5).

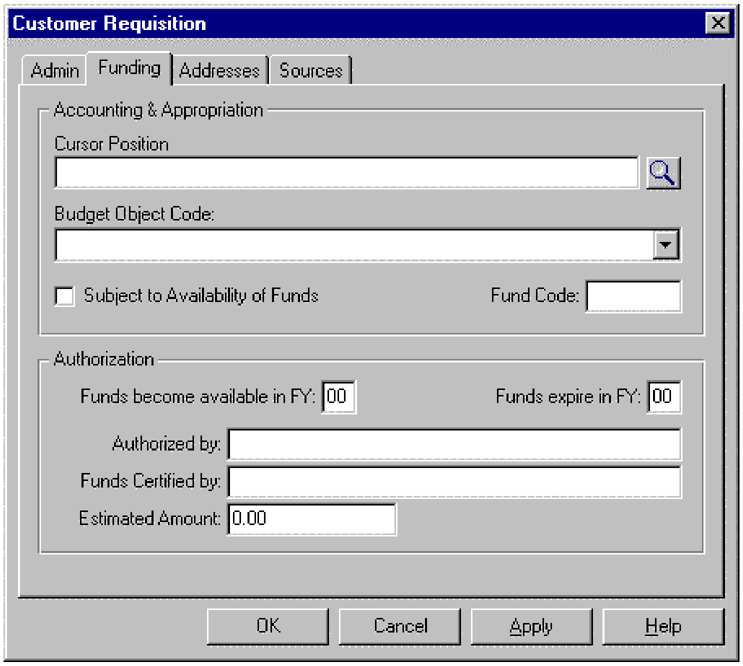

Figure 5 – Customer Requisition Funding Screen

Enter pertinent information in the following corresponding fields. Be sure to use the *<TAB>* key to move from field to field.

Field Name	Field Description
Accounting and Appropriation Data	Enter the accounting code **Field Type:** Max 100 alphanumeric characters
BOC	Enter the Budget Object Code. **Field Type:** Max 6 alphanumeric characters
Subject to availability to Funds	When option is checked, indicates that the funds on this acquisition as “not-yet-available”. **Field Type:** Logical field (Yes/No)
Fund Code	All sites may not use this field. However, if there is a fund code, name, or other fund identification code for the procurement or for individual line items, enter the data here. **Field Type:** Max 4 alphanumeric characters
FY Funds Available	Enter the fiscal year that the funds become available. **Field Type:** Integer 99
FY Funds Expire	Enter the fiscal year that the committed funds will expire. **Field Type:** Integer 99

Authorized By	Enter the name of the supervisor/manager that will approve the funds for the acquisition. **Field Type:** Max 30 alphanumeric characters
Funds Certified By	Enter the name of the Authorizing Officer that will approve the supplies/services. ***Note:*** *If the person that certifies the funds is not the same person that authorizes the funds, then enter the name in this field.* **Field Type:** Max 30 alphanumeric characters
Estimated Amount	Enter the estimated value of the requisition. **Field Type:** Decimal ->>>,>>>,>>>,>>9.99

When finished, users will click the *Addresses* tab, this will display the *Customer Requisition Addresses Screen* (fig. 6).

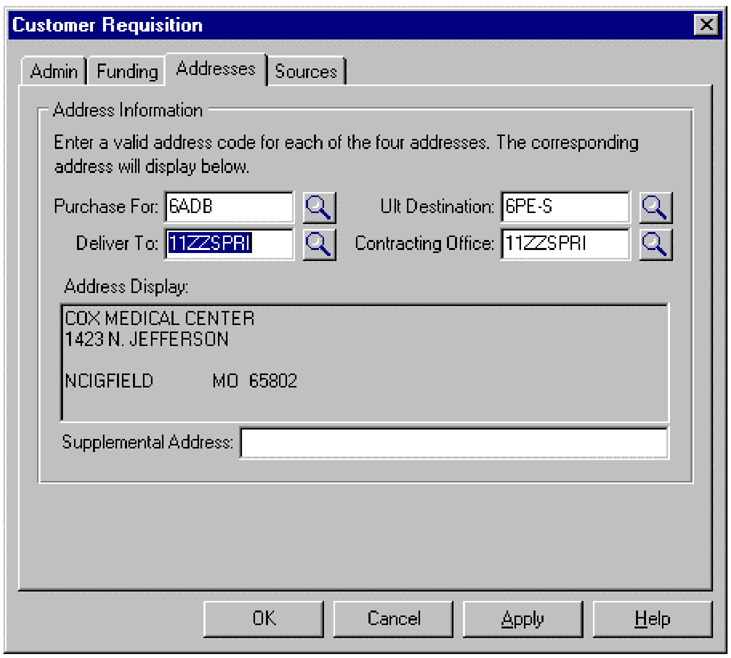

Figure 6 – Customer Requisition Addresses Screen

All addresses need to be listed in the Address table.

Enter pertinent information in the following corresponding fields. Be sure to use the *<TAB>* key to move from field to field.

Field Name	Field Description
Purchase For	The address of the office that is ordering the supplies or requesting the services. **Field Type:** Address code Max 8 alphanumeric characters
Ult Destination	All sites do not use ultimate Destination addresses. If the Deliver To address is the final destination of the items/services being procured, the Ultimate

	Destination address is probably not used and may remain blank. However, if the items and/or services are "ultimately" to be provided to a location other than the Deliver To address, then the Ultimate Destination address will represent the location to which the items should be forwarded after delivery. **Field Type:** Address code Max 8 alphanumeric characters
Deliver To	The address of where the items will be delivered. **Field Type:** Address code Max 8 alphanumeric characters
Contracting Office	Default Contracting Office address will display. **Field Type:** Address code Max 8 alphanumeric characters
Supplemental Address	Enter any additional information in this field (i.e. Loading Dock, Building Number, Room Number). **Field Type:** Max 40 alphanumeric characters

When finished, users will click the *Sources* tab, this will display the *Customer Requisition Sources Screen* (fig. 7).

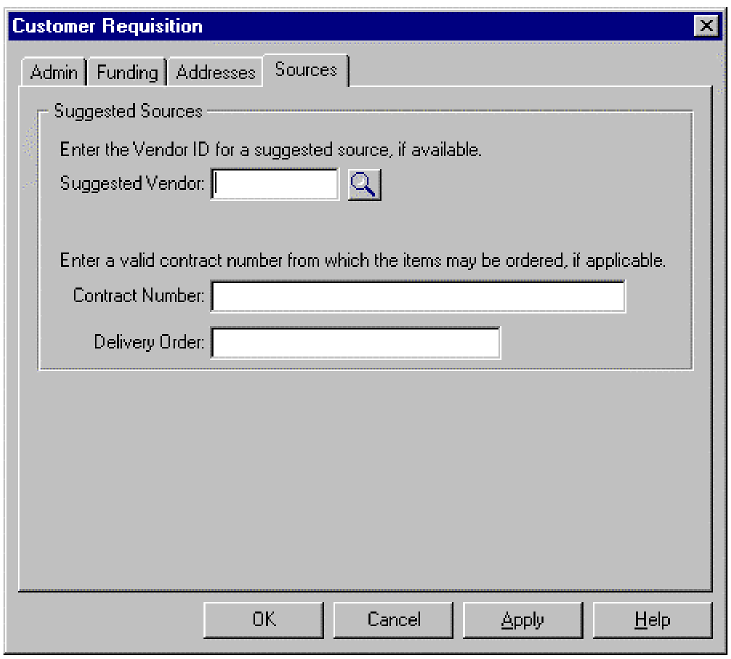

Figure 7 – Customer Requisition Sources Screen

Enter pertinent information in the following corresponding fields.

Be sure to use the *<TAB>* key to move from field to field.

Field Name	Field Description
Suggested Vendor	If the items being procured on the requisition come from a known source, then enter the vendor ID. **Field Type:** Max 8 numeric characters
Contract Number	If the items on this procurement may be ordered from a "Local" requirements or IDIQ type contract. Enter the contract number without any dashes. This will allow the requestor to select line items from previously created delivery orders. ***Note:*** *The Contract Number can either be entered at the Requisition or Purchase Request level, within the Admin portion of the procurement.* **Field Type:** Max 40 alphanumeric characters
Delivery Order	Enter the delivery order number of the "Local" requirements or IDIQ type contract. Enter the Deliver Order number without any dashes. This will allow the requestor to select line items from previously created delivery orders. **Field Type:** Max 30 alphanumeric characters

When finished users will click the *OK* button, this will display the *Customer Requisition Summary Screen* (fig. 8).

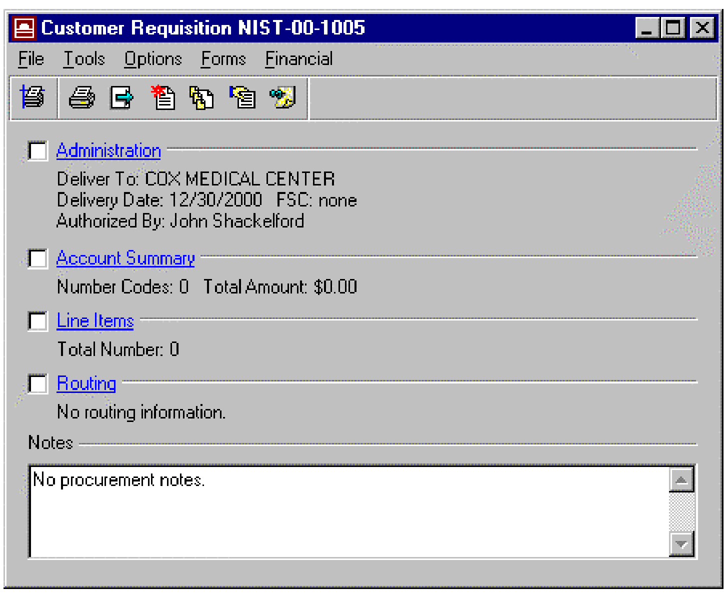

Figure 8 – Customer Requisition Summary Screen

From the *Customer Requisition Summary Screen* users will click the *Account Summary* hyperlink.

The *Account Summary Management Browser* will display (fig. 9).

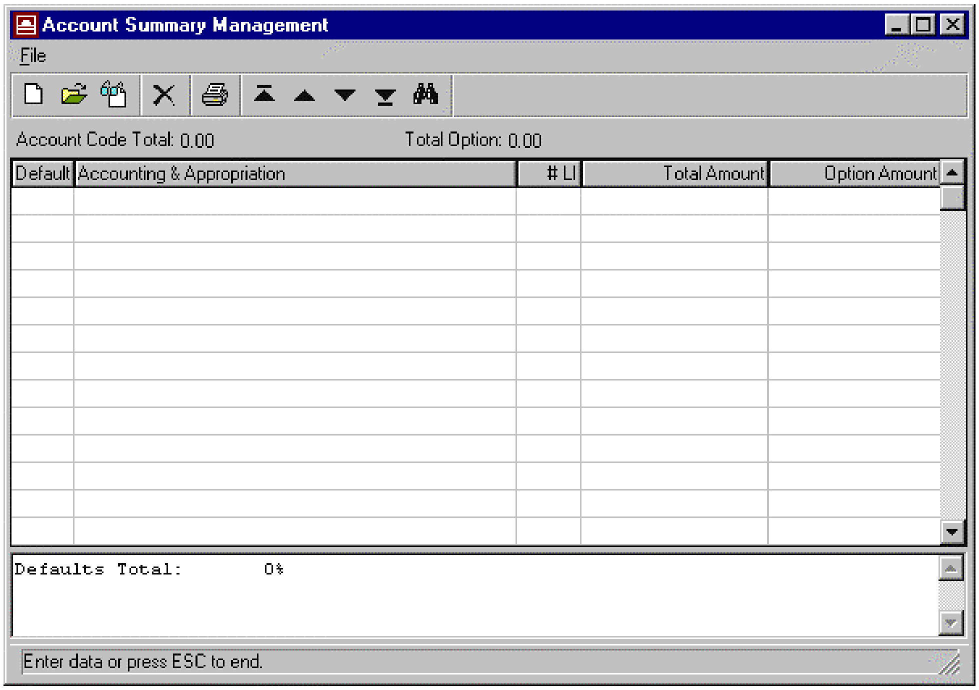

Figure 9 - Account Summary Browser

To enter a new account entry, users will click the *New* button from the *Account Summary Management Browser*.

The *Accounting Code Summary Screen* will display (fig. 10).

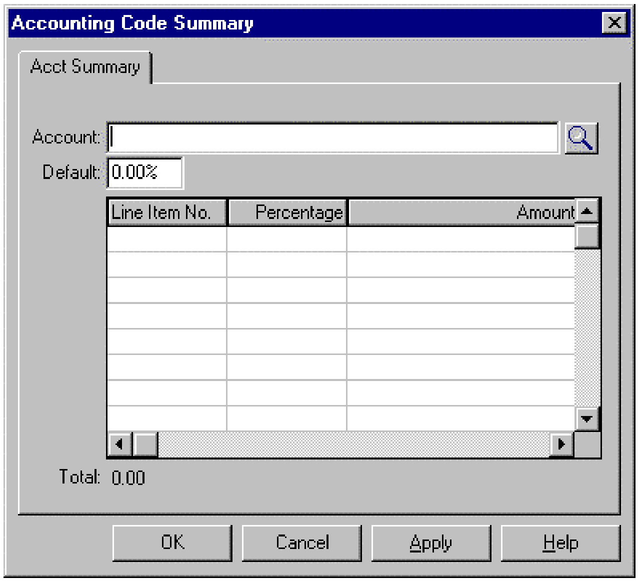

Figure 10 - Accounting Code Summary Screen

To search for an accounting code, users will click the magnifying glass icon to the right of the *Account* field.

The *Accounting Search Screen* will display (fig. 11).

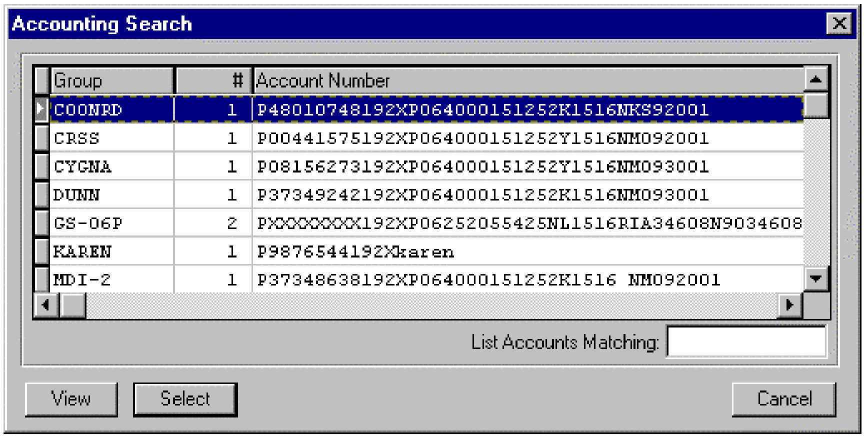

Figure 11 - Accounting Search Screen

Highlight a accounting code from the list, then click the *Select* button, which will automatically return users to the *Accounting Code Summary Screen* displaying the newly entered account code (fig. 12).

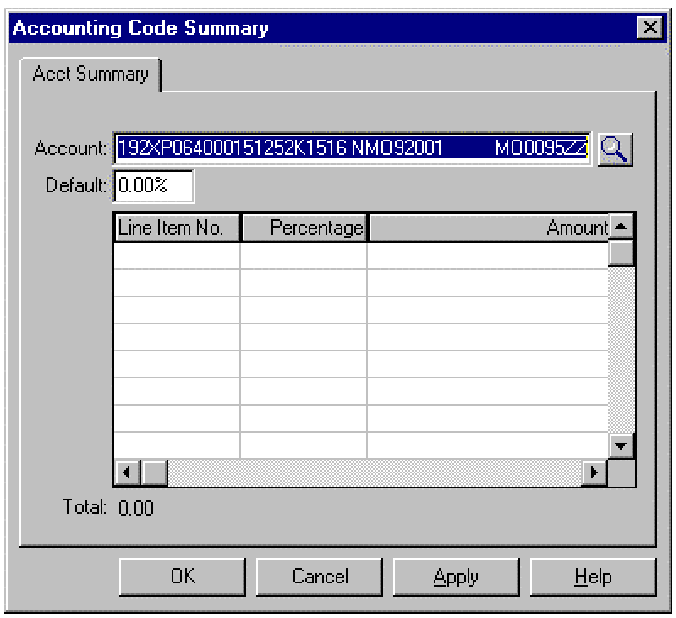

Figure 12 - Accounting Code Summary Screen

Press the <*TAB*> key twice, which will position the cursor within the *Default* field. Enter the percentage that this accounting code will be funded.

When using multiple accounting codes per line item, users will enter the *%* for this accounting code. The following example, 50% was entered for the account code (fig. 13).

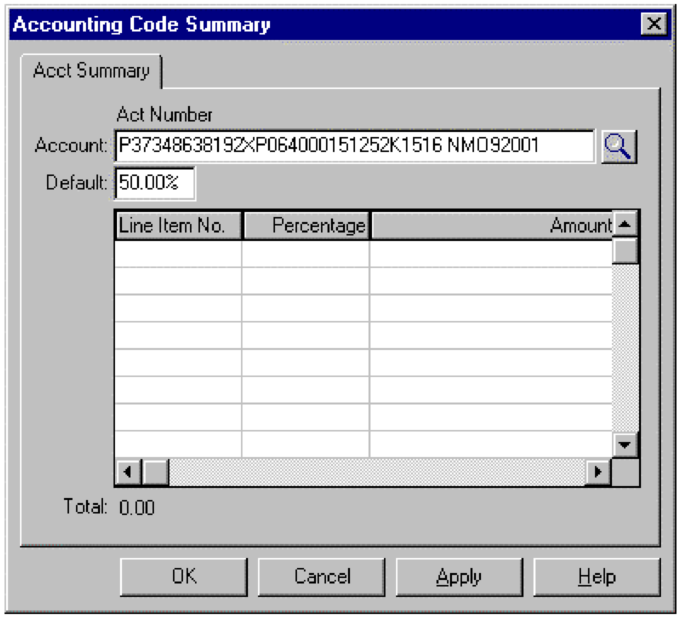

Figure 13 - Accounting Code Summary Screen

Click the *OK* button and users will return to the *Account Summary Management Browser* displaying the newly created accounting code (fig. 14).

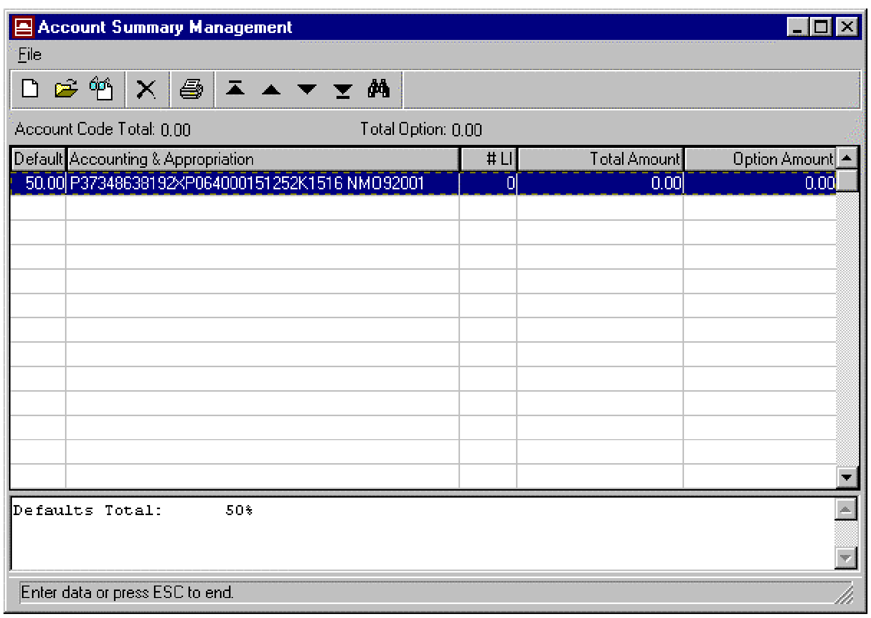

Figure 14 - Account Summary Management Browser

Repeat the same steps as listed above when entering additional accounting codes.

Users will click the *New* button and select a different account code, enter *50%* and click *OK*.

Once users have returned to the *Account Summary Management Browser* they should have two separate accounting codes, each with 50% (fig. 15).

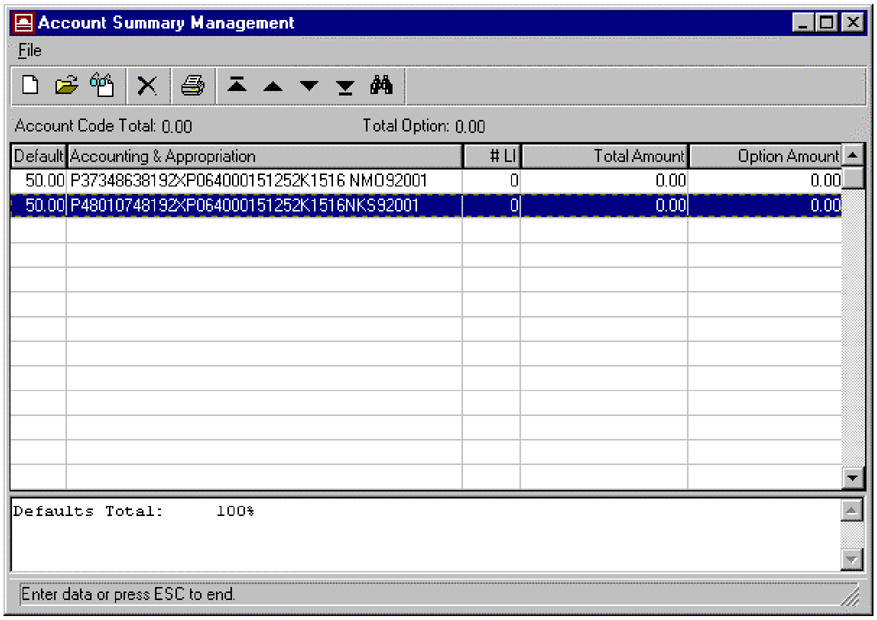

Figure 15 - Account Summary Management Browser

Close the *Account Summary Management Browser* by clicking the *Close* button (X) within the upper right hand corner of the browser.

The *Customer Requisition Summary Screen* will display the total number of account codes entered (fig. 16).

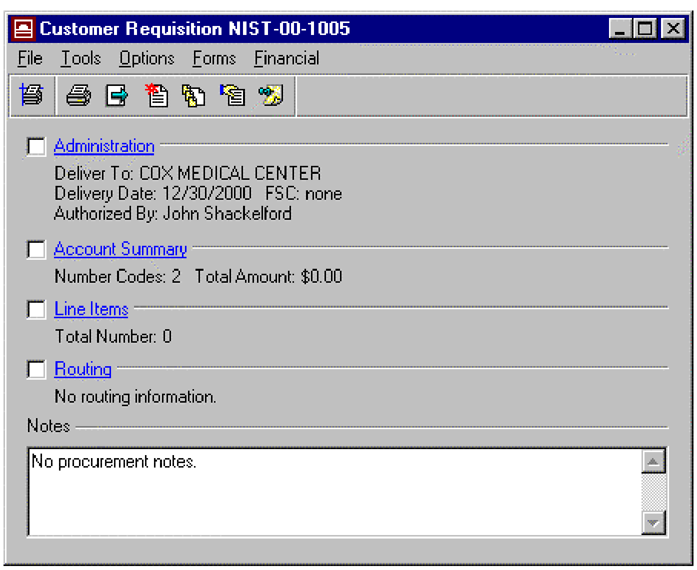

Figure 16 - Customer Requisition Summary Screen

Create new Line Items

To create and/or modify line items, users will click the *Line Item* hyperlink from the *Customer Requisition Summary Screen*.

The *Customer Requisition Line Item Management Browser* will display (fig. 17).

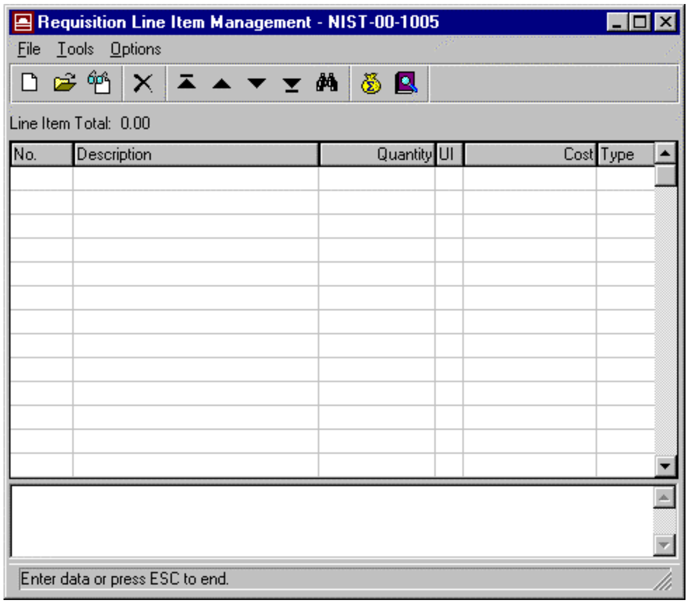

Figure 17 – Customer Requisition Line Item Management Browser

Users will click the *New* button, this will display the *Requisition Line Item Detail Screen* (fig. 18).

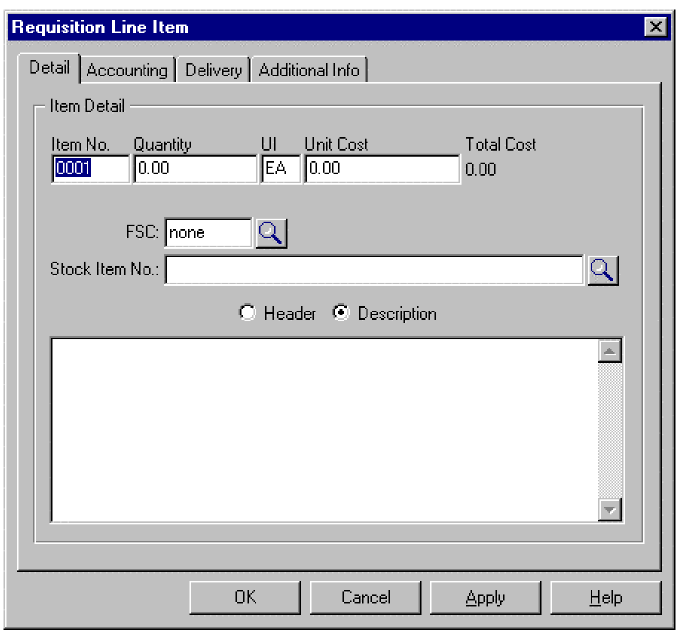

Figure 18 – Requisition Line Item Detail Screen.

Be sure to press the *<TAB>* to move from field to field on the screen.

Field Name	Field Description
Line Item Number	You may enter 0001, 0002, 0003, etc for CLINS or you may enter 0001AA 0001AB, 0001AC if this item is a SUB-CLIN. **Field Type:** Max 6 alphanumeric characters
Quantity	Enter the quantity required for this item. **Field Type:** Decimal ->>>,>>>,>>9.99
Unit of Issue	Enter the unit of issue for this line item. **Field Type:** 2 digit characters
Unit Cost	Enter the appropriate unit cost for this item. ***Note:*** *Once the unit cost is entered, press the <TAB> key will automatically calculate the total cost of the line item.* **Field Type:** Decimal ->>>>>>>>>>>9.99999
FSC	The FSC code defaults from the Administrative portion of the requisition. **Field Type:** Max 4 alphanumeric characters
Stock Item Number	Stock Item numbers may be set up for recurring requirement description detail. If a stock item number is entered in this field, and the description field is blank, the Description box will be automatically completed with the Stock Item description. **Field Type:** Need to verify
Header Text	Header text is used for text users would like to have print with the line items, directly above the description enter for that line item. Each line item may have it's own header text, however, this field is most commonly used as the exception rather than the rule. **Field Type:** 300 alphanumeric characters
Description Text	When the Description radio button is selected, enter the line item description for the supplies or services being procured. **Field Type:** 300 alphanumeric characters

When finished, users will click the *Accounting* tab this will display the *Requisition Line Item Accounting Screen* (fig. 19).

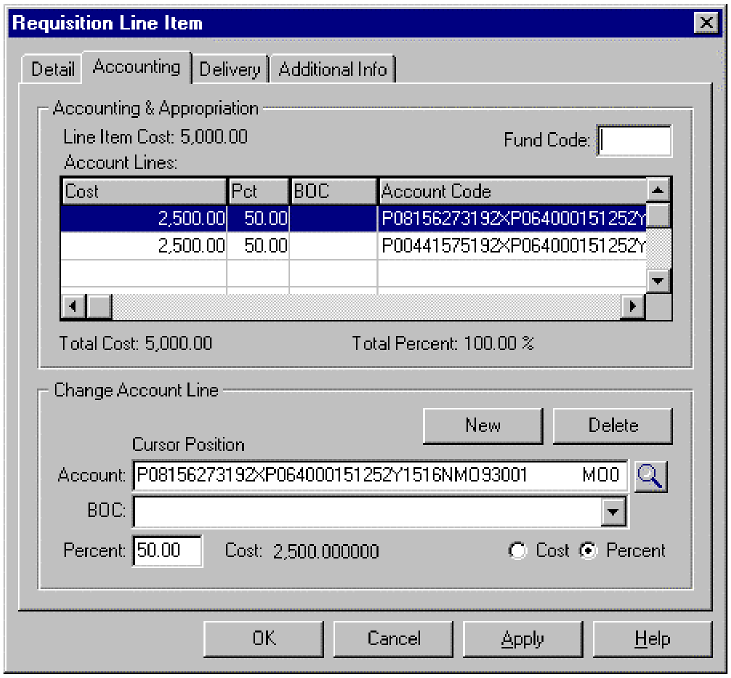

Figure 19 – Requisition Line Item Accounting Screen.

Field Name	Field Description
Fund Code	Defaults from the Admin portion of the requisition.
Account Code	The Account Code will default from the Admin portion of the requisition, if entered. **Field Type:** Max 100 alphanumeric characters
BOC	The Budget Object Code will default from the Admin portion of the requisition, if entered. **Field Type:** 6 alphanumeric characters
Cost/Percent	Select either the *Cost* or *Percent* radio option. Logical field (Yes/No)

To search for an accounting code, users will click the magnifying glass to the right of the *Account* field.

The *Accounting Search Screen* will display (fig. 20).

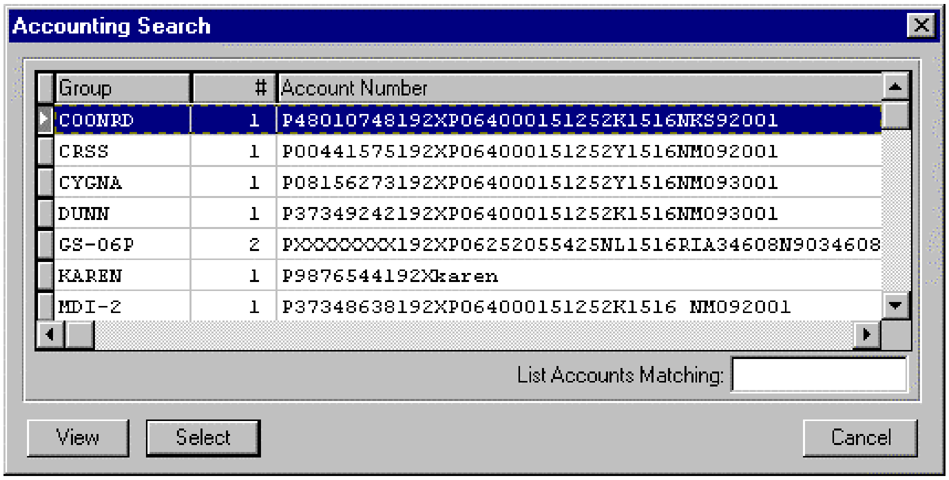

Figure 20 – Accounting Search Screen

Users will scroll through the list and highlight an accounting code, then click the *Select* button.

Users will return to the *Accounting Search Screen* with the accounting code displayed in the *Account* field (fig. 21).

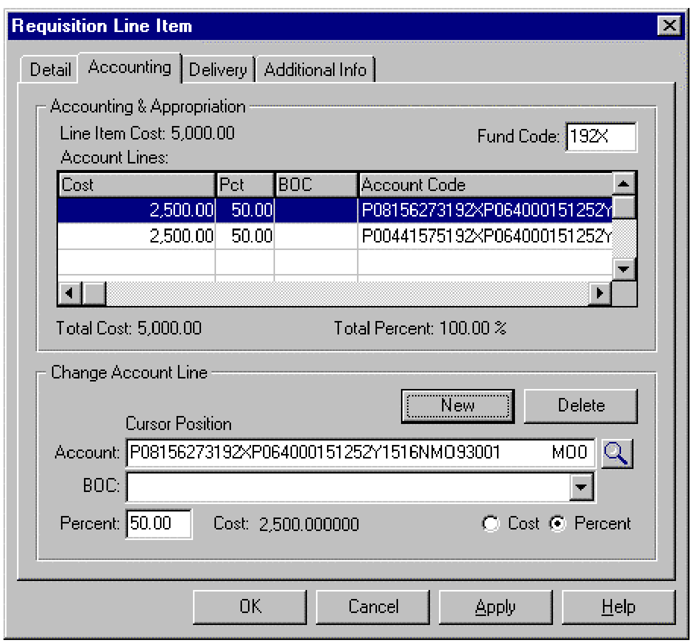

Figure 21 – Requisition Line Item Accounting Screen

If applicable, select the *BOC* code by clicking the drop-down arrow next to the BOC field (fig. 22).

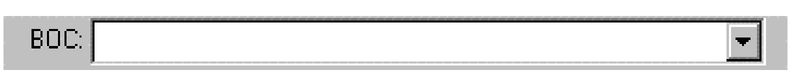

Figure 22 – BOC drop-down

Either enter a percentage or cost for this line item by clicking the *Percent* or *Cost* radio buttons (fig. 23-24).

Figure 23 – Percent radio option

Figure 24 – Cost radio option

When finished, users will click the *Delivery* tab, this will display the *Requisition Line Item Delivery Screen* (fig. 25).

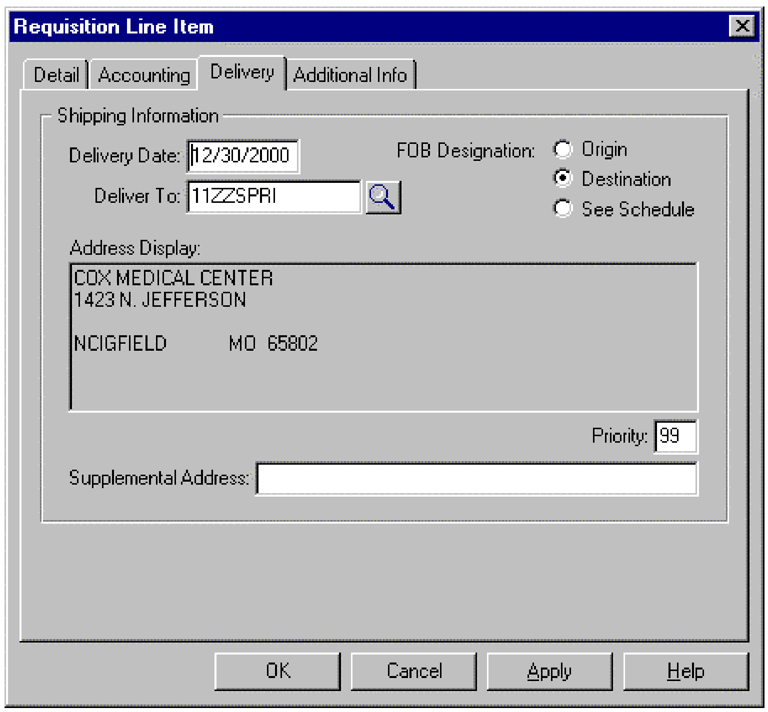

Figure 25 - Requisition Line Item Delivery Screen

Enter pertinent information in the following fields.

Field Name	Field Description
Delivery Date	Defaults from the Admin portion of the requisition. Otherwise, enter the date that supplies will be delivered or the date that the services will be performed. Each line item may have the same or different Delivery Date. **Field Type:** Date field MM/DD/YYYY
Deliver To	Defaults from the Admin portion of the requisition. Otherwise, enter the address that the items will be delivered. Each line item may have the same or different Delivery To. **Field Type:** Address Code max. of 8 alphanumeric characters

Field Name	Field Description
FOB Designation	Each line item may have the same or different FOB destination. Users may specify different FOB for each line item. **Field Type:** 1 character Origin=O Destination=D See Schedule=S
Priority	Defaults from the Admin portion of the requisition. **Field Type:** Integer 99
Supplemental Address	Defaults from the Admin portion of the requisition. Each line item may have the same or a different supplemental address. **Field Type:** Max 40 alphanumeric characters

When finished, users will click the *Additional Info tab* this will display the *Requisition Line Item Additional Info Screen* (fig. 26).

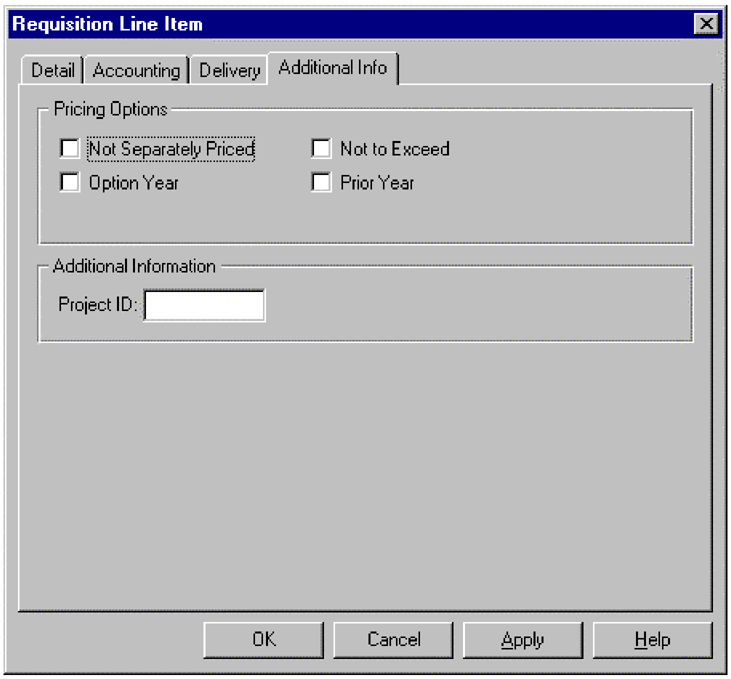

Figure 26 - Requisition Line Item Additional Info Screen

Enter pertinent information in the following fields.

Field Name	Field Description
Not Separately Priced	Check the box if this item is Not Separately Priced. **Field Type:** Logical field (Yes/No)
Option Year	Check the box to designate this item as an Option Year. **Field Type:** Logical field (Yes/No)
Not to Exceed	Check box to designate this item as Not To Exceed. **Field Type:** 1 character Quantity=Q Unit Cost=U Both=B
Prior Year	Check if obligating funds is other than the current year. ***Note:*** *This field is used when transactions are sent through financial interfaces. Checking this field tells the financial interface that the obligation or deobligation transaction is for funds from a prior fiscal year, not the current fiscal year.* **Field Type:** Logical field (Yes/No)
Project ID	Defaults from the Admin portion of the requisition. **Field Type:** Max 8 alphanumeric characters

When finished, users will click the *OK* button and return to the *Requisition Line Item Management Browser* (fig. 27).

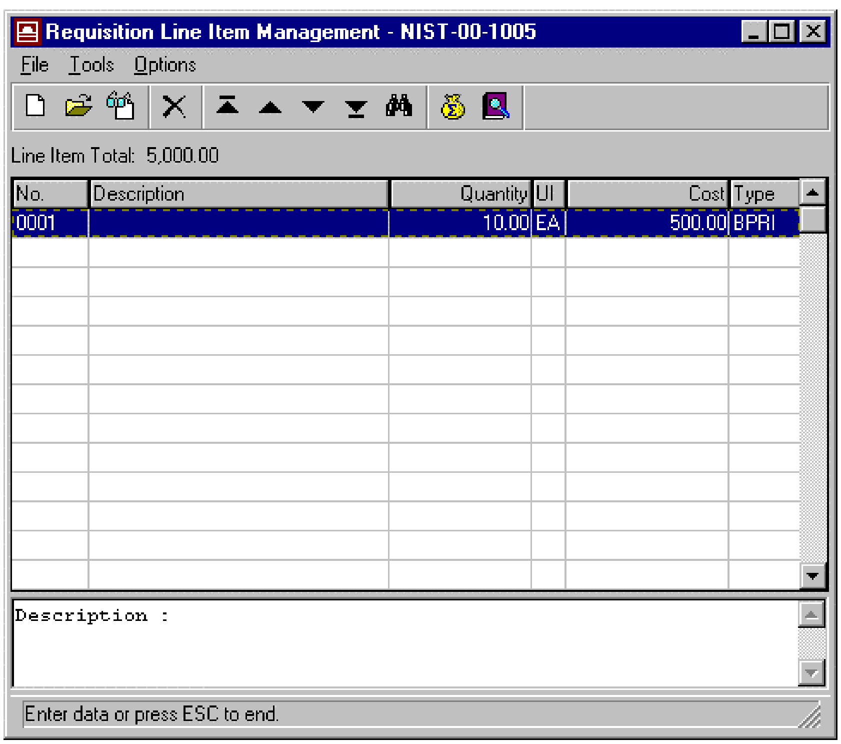

Figure 27 - Requisition Line Item Management Browser

Click the *Close* button (X) within the upper right hand corner of the *Requisition Line Item Management Browser*, and return to the *Requisition Summary Screen (fig. 28).*

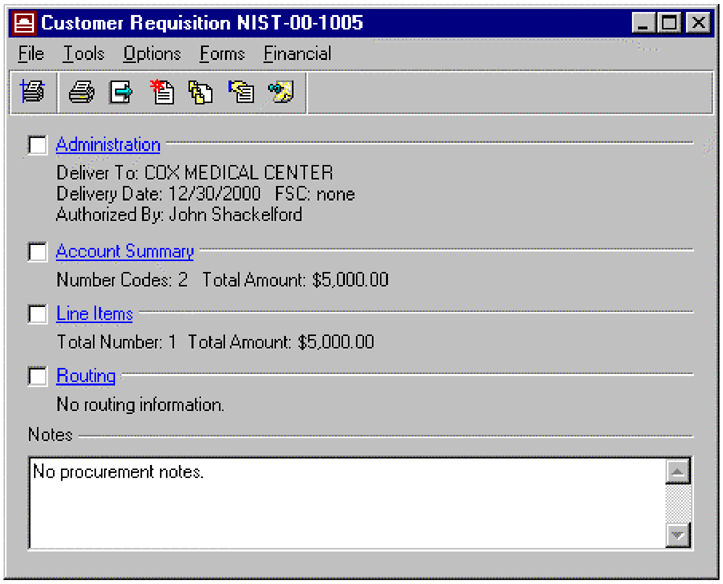

Figure 28 - Requisition Summary Screen

Routing the Requisition for approval

To route the requisition for approval, users will click the *Route* hyperlink from the *Customer Requisition Summary Screen*.

The *Route List Screen* will display (fig. 29).

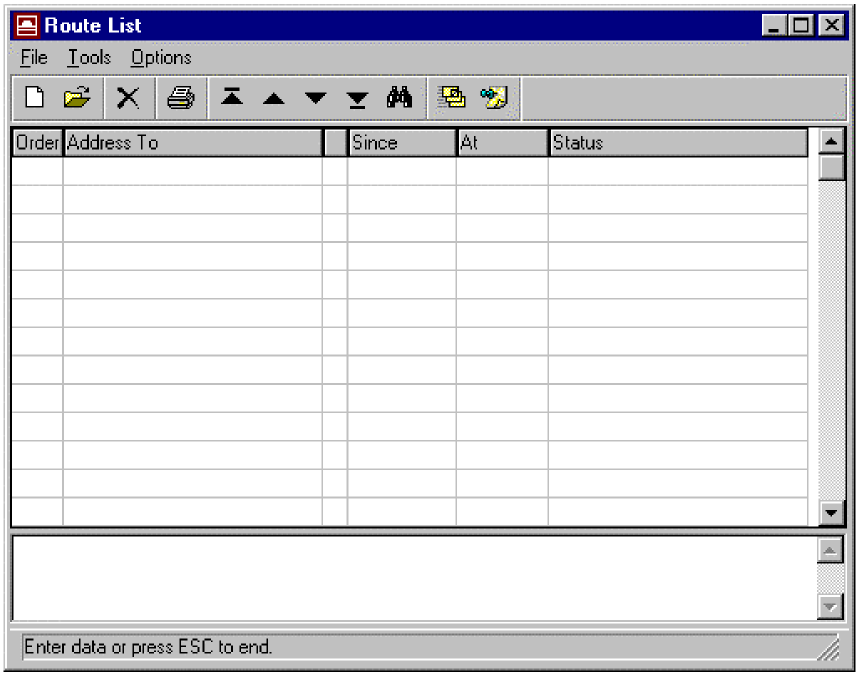

Figure 29- Route List Browser

Users may choose from a list of Route Models, by selecting *Tools/Model* from the *Route List Browser* (fig. 30).

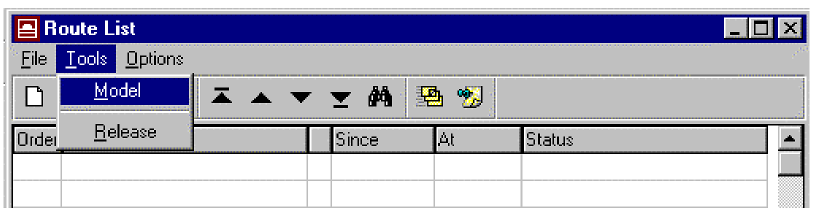

Figure 30 - Route List Browser

The *Route List Model Screen* will display (fig. 31).

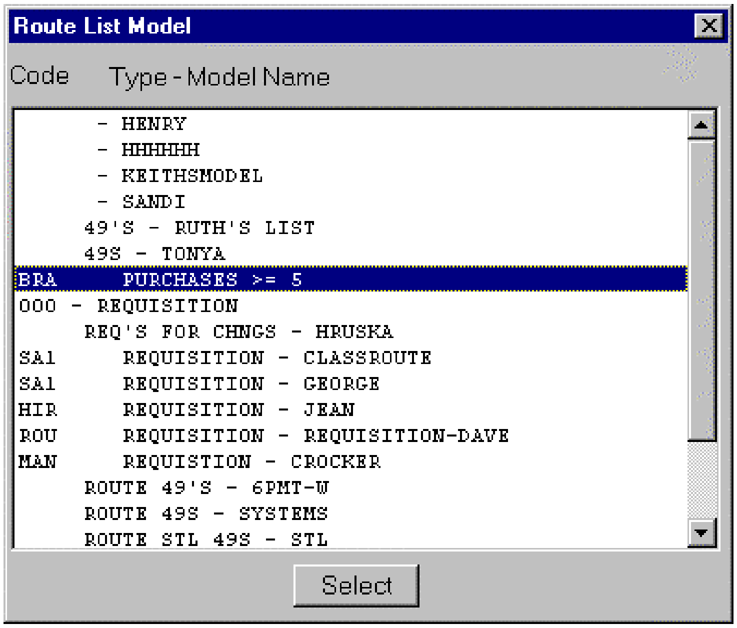

Figure 31 - Route List Model Screen

Select a route list model, then click the *Select* button and return to the Route *List Browser*.

Otherwise, to set up a new route list, users will click the *New* button from the *Route List Browser* (fig. 32).

Enter the 3-digit User ID within the *Reviewer's Code* field. In addition, enter the order in which the reviewer will receive the item, as well as entering the priority of document being routed.

Specify one of the following radio options:

- Approval Required
- Carbon Copy

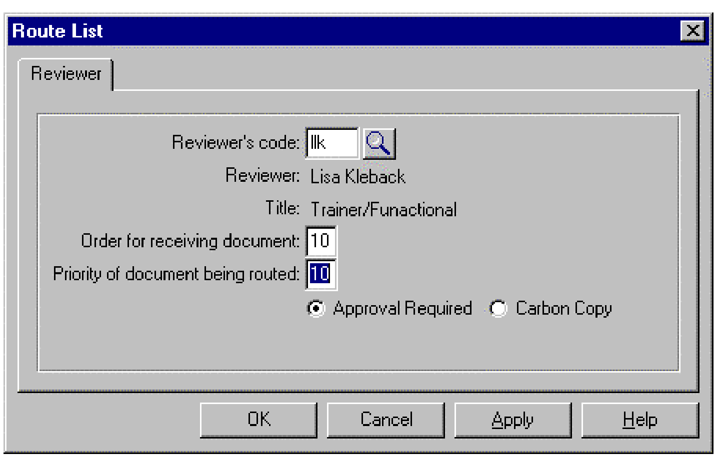

Figure 32 - Route List Screen

Click the *OK* button and users will return to the *Route List Browser*.

Repeat the previous steps to add additional reviewer's (fig. 33).

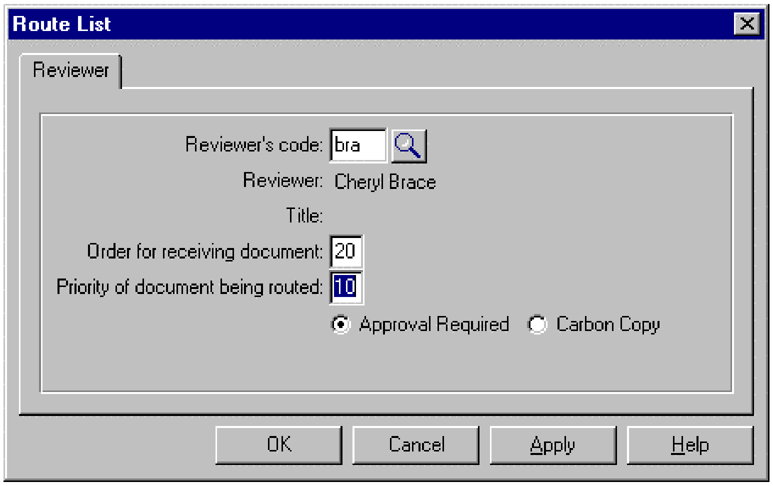

Figure 33 - Route List Screen

When finished, users will click the *OK* button and return to the *Route List Browser* that displays both reviewers (fig. 34).

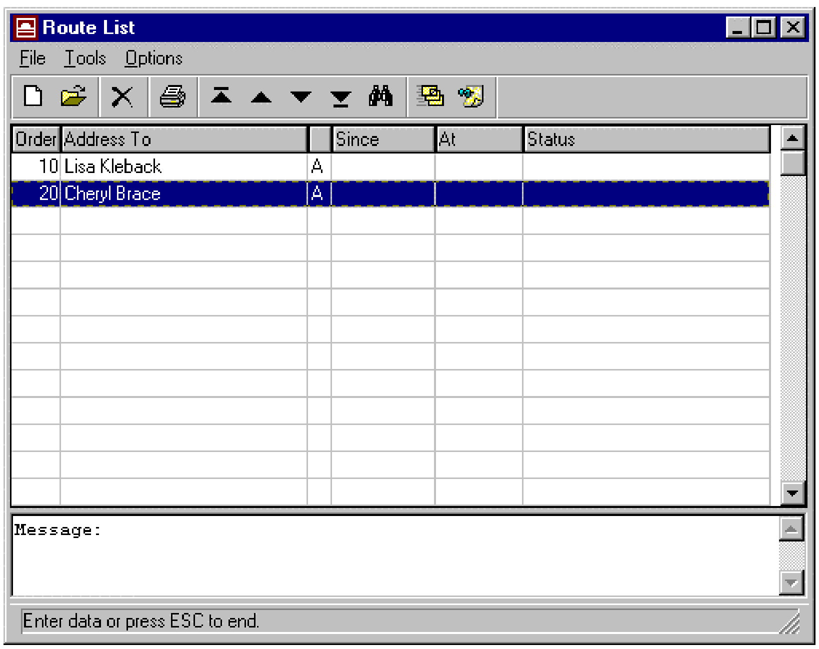

Figure 34 - Route List Browser

To begin the routing process, users will click the *Release* button from the *Route List Browser*, this will display the status of the route list as "Review Pending" (fig. 35).

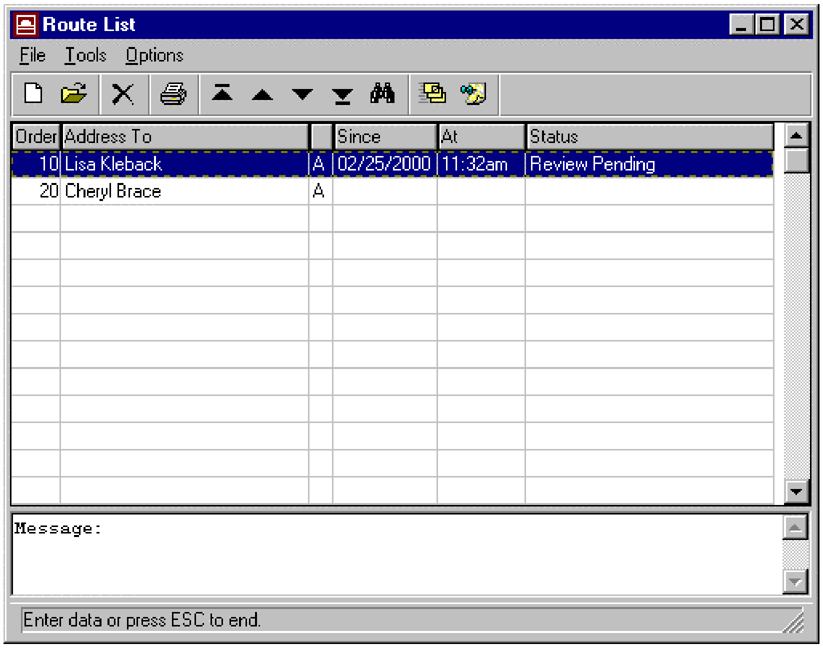

Figure 35 - Route List Browser - Review Pending Status

Close the *Route List Browser* and users will return to the *Customer Requisition Summary Screen* that displays the current status and reviewer's name for this particular record (fig. 36).

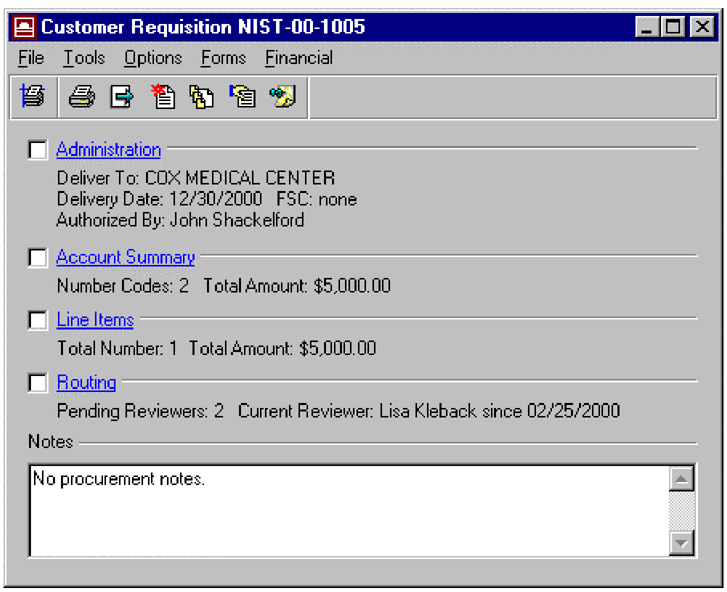

Figure 36 - Customer Requisition Summary Screen

Reviewer's In Box

Each reviewer on the route list will receive an e-mail notifying them that an action has been routed to them for review and may need approval.

The reviewer will notice that their *Comprizon.Buy In Box* appears full (yellow paper).

In addition, the status bar displays the number of new items, along with a total number of items within the Comprizon.Buy *In Box* (fig. 37).

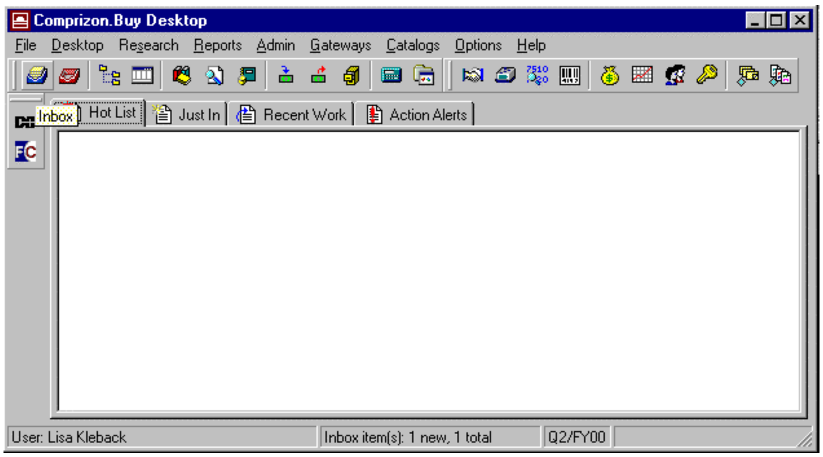

Figure 37 - Comprizon.Buy desktop

From the Comprizon.Buy desktop, the reviewer will open their *In Box* by clicking on the *In Box* icon on the toolbar.

The *Review & Approval Browser* will display (fig. 38).

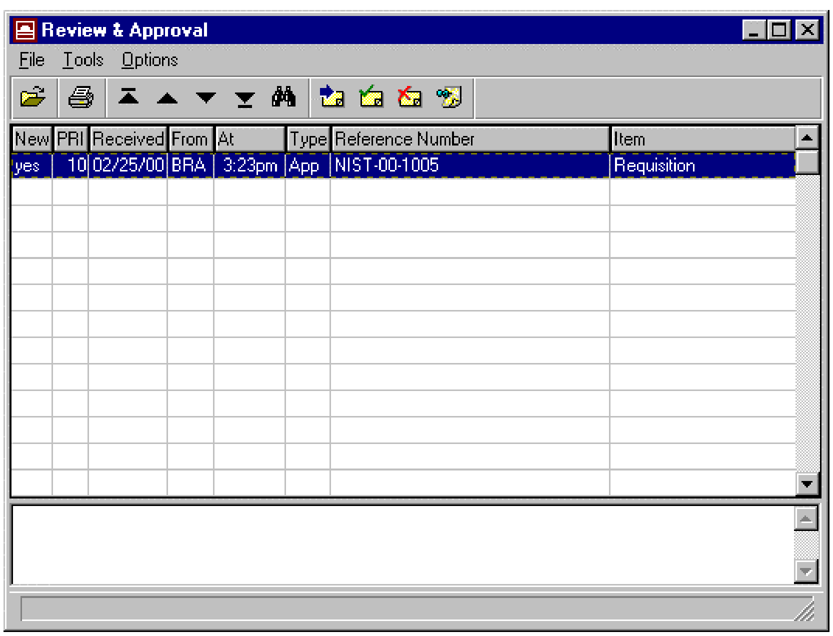

Figure 38 - Review & Approval Browser

One new item will be listed indicating the originator 3 - digit ID, date, time that the item was routed, along with the type of record that was routed (i.e. Requisition, Purchase Request, Solicitation, Award, Modifications or Project), and the record number. The reviewer will have the ability to open and review the routed item.

Then the reviewer will either *Approve* or *Disapprove* the routed record, by selecting the corresponding buttons from the *Review & Approval Browser* (fig. 39).

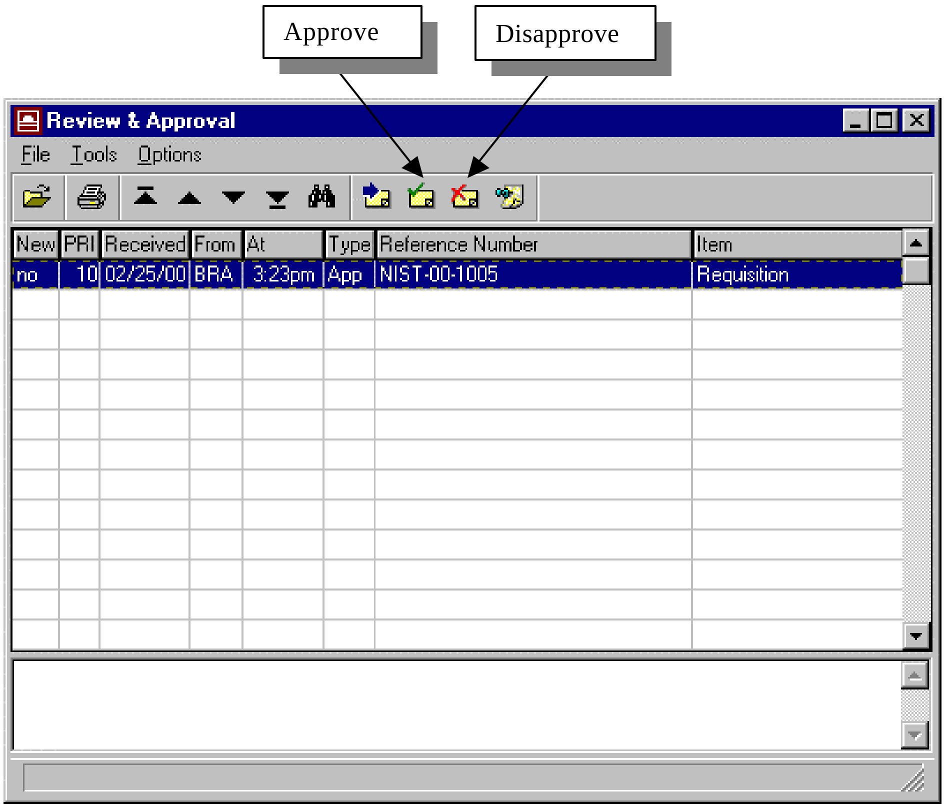

Figure 39 - Review & Approval Browser

Once the requisition has completed the approval process, the requisition will be submitted and assigned.

Submitting a Requisition

To submit a requisition, users will click the *Submit Requisition* button from the *Customer Requisition Summary Screen* (fig. 40).

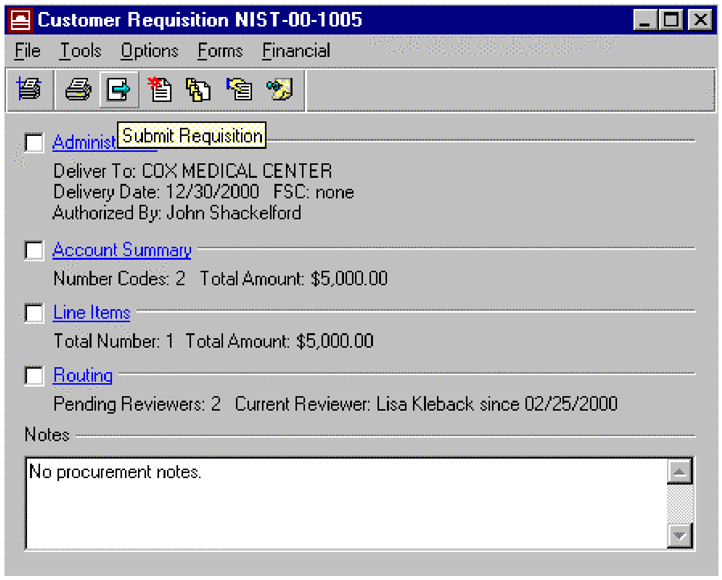

Figure 40 - Customer Requisition Summary Screen

The *Submit Requisition Screen* will display (fig. 41).

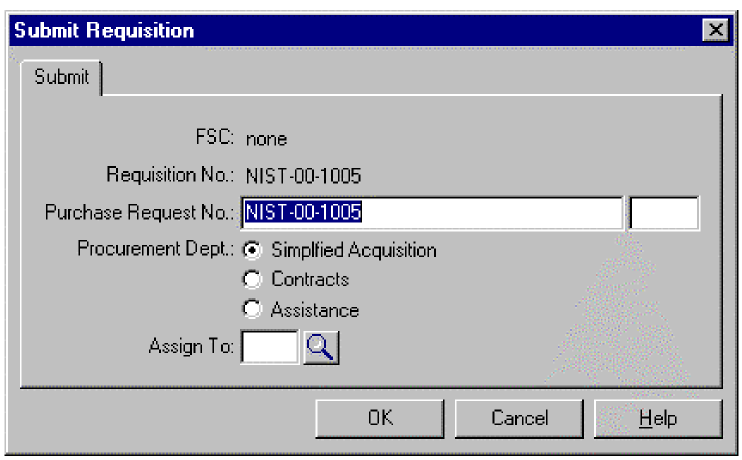

Figure 41 - Submit Requisition Screen

From the *Submit Requisition Screen*, users will either accept the purchase request number, or enter in a new number.

Then users will select which subsystem in which the requisition will be submitted:

Simplified Acquisition - used for small purchases <= $100,000.
Contracts - used for large purchases > $100,000.

Lastly, users will enter the 3-digit User ID that indicates the person that the requisition will be assigned to.

When finished, users will click the *OK* button and return to the *Customer Requisition Summary Screen*.

Return to the worksheet by clicking the *Close* button at the upper right hand corner of the *Customer Requisition Summary Screen*, this will display the status of the requisition as *"Submitted"* (fig. 42).

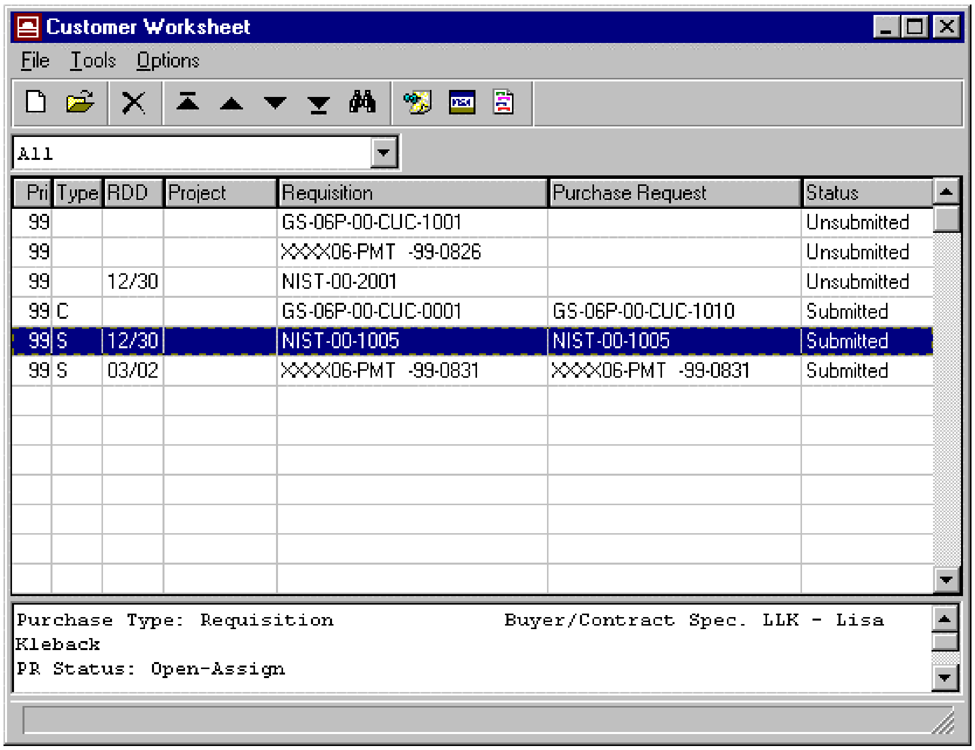

Figure 42 - Customer Worksheet